OnBase Installation Guide

Version 4.2

OnBase Version 15.0.0.40 and 15.0.2.174

Table of Contents

About this Document

Purpose
This document provides guidance for the installing of OnBase Unity Client and OnBase related modules.

Intended Audience
This document is distributed to the **KCTCS** personnel that will be involved in installing OnBase components.

1   Installation Guide

To install any of the following OnBase components a user will need administrative privileges. The OnBase Unity Client is the main component for which all other OnBase modules will communicate through. This guide is a comprehensive list of all modules; however, only install the modules as needed by the individual's need to use OnBase.

2   OnBase Unity Client

Operating System Requirements
The above Client module supported operating systems require both:

Component	Minimum	Recommended
CPU	1.6 GHz dual-core	2.4 GHz dual-core
Memory (RAM)	2 GB	4 GB

- Windows 7, 8, 8.1 or 10
- Microsoft .NET Framework 4.5.1 or 4.5.2
- Microsoft Visual C++ 2013 Redistributable Package (x86)

2.1   MSI and Click-Once Installments

There are two available options for installing OnBase Unity Client. See the features below to determine which installation to use.

	Click-Once	MSI
Installs Microsoft Redistributable Requirement automatically	✓	
Automatically updated when a new version is available	✓	
Installs per profile	✓	
Installs on all profiles		✓
Can be silently installed		✓
Manual updates required		✓

2.2   Click-Once Installation (KCTCS currently does not participate in the Click-Once Install. IT- please refer to the MSI install directions on page 5.

1) Open Internet Explorer and choose Tools, Internet Options. Under the Security tab, choose the "Trusted Sites" zone and click on the Sites button. Add the https://kctcs.onbaseonline.com/1502downloads/ site to the list of trusted sites and then click Close. Set the security level for the Trusted Sites zone to "Low". Click Apply and then click OK.
2) **KCTCS is currently running two active versions of OnBase. Depending on the department the end user belongs to will determine which version should be installed. Here is the current environment setup:**
   - System Office - 15.0.2.174 - Click Once Installation is currently not available
   - All other departments - 15.0.0.40 - https://kctcs.onbaseonline.com/UnityClientLDAP
3) Enter the following URL in Internet Explorer.
4) Once the Unity Client prompt appears, click Install.
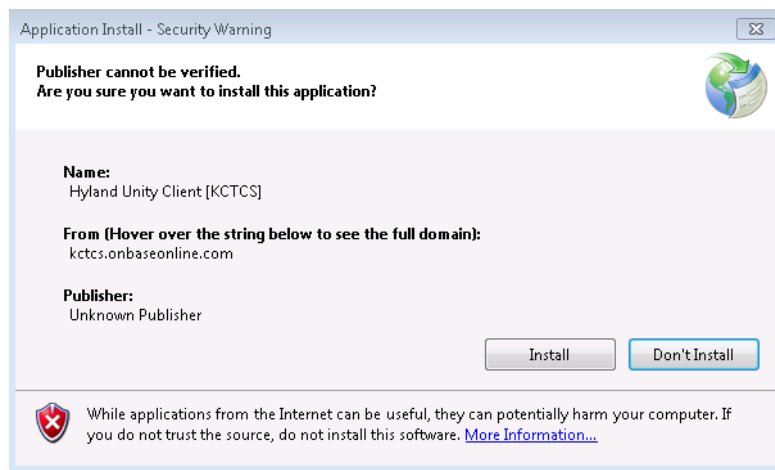
5) Once the download is complete, the sign-on screen for OnBase will appear. Have the user enter his/her network user id and password. The first time the user logs into OnBase, you will be prompted to accept the software license agreement. Accept the agreement and then the user will be logged into the OnBase Unity Client.

2.3   MSI Installation

Standard (EXE or MSI) Installers — There are two methods for running OnBase installers: Interactive and silent. An interactive installation requires user interaction with dialog boxes during the installation process. A silent installation does not require user interaction during the installation process.
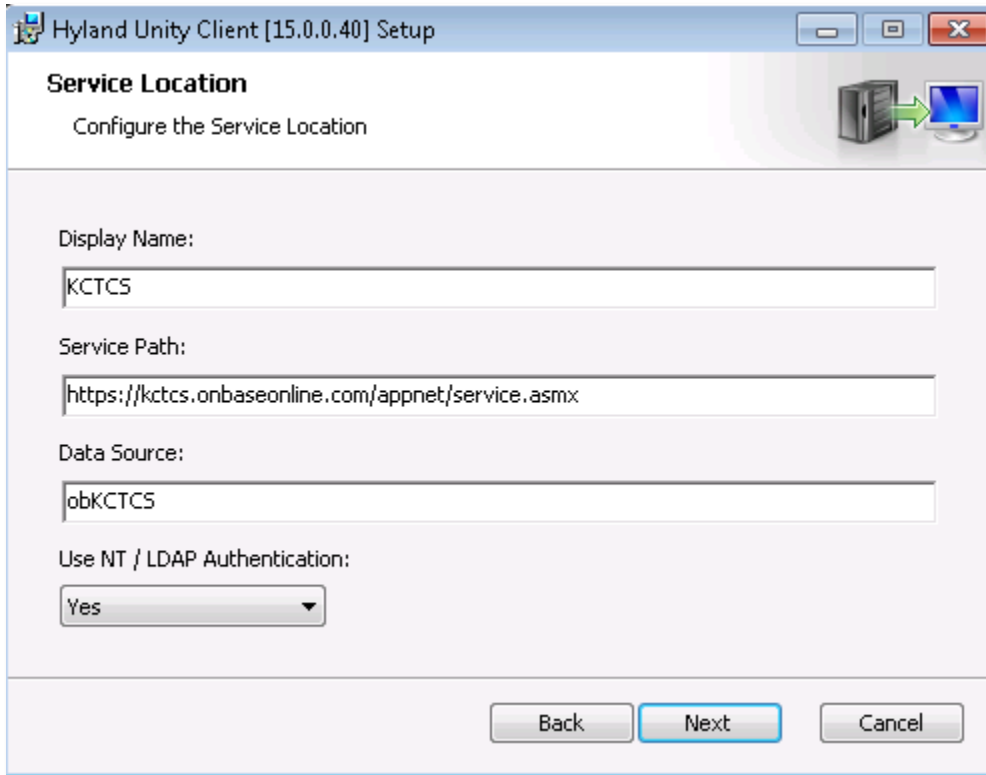
OnBase installers may consist of both an executable file (.exe) and a Windows Installer Package file (.msi). When performing an interactive installation, and both an executable file and MSI are available, use the executable file to ensure a complete installation. The executable validates that all prerequisites are met before proceeding with the installation. If any missing prerequisites are identified, the installer alerts the user. Most missing prerequisites can be installed directly from the installer before continuing the installation process.

When performing a silent installation, and both an executable file and MSI are available, use the MSI. Since the MSI package does not validate prerequisites, you must ensure that Windows Installer 3.0 or greater is installed on each workstation and that all other prerequisites are met before running the MSI. If any prerequisites are not met, a silent installation from the MSI will fail without alerting the user.

6) Add the https://kctcs.onbaseonline.com site to the list of trusted sites and then click Close. Set the security level for the Trusted Sites zone to "Low". Click Apply and then click OK.
7) Open Internet Explorer, and enter the following URL:
   https://kctcs.onbaseonline.com/1502downloads/
8) **KCTCS is currently running two active versions of OnBase. All users need to install version 15.0.2.174 by December 20, 2016**
   - 15.0.2.174 - Unity Client1502174.zip
   - 15.0.0.40 - Unity Client.zip- Old version. Will not be active past Dec 2016
9) Click the Unity Client link for the new version.
10) Save the file to a folder. Once the download is complete, unzip the contents to a folder.
11) Launch the installer and select the following components to install in the wizard.
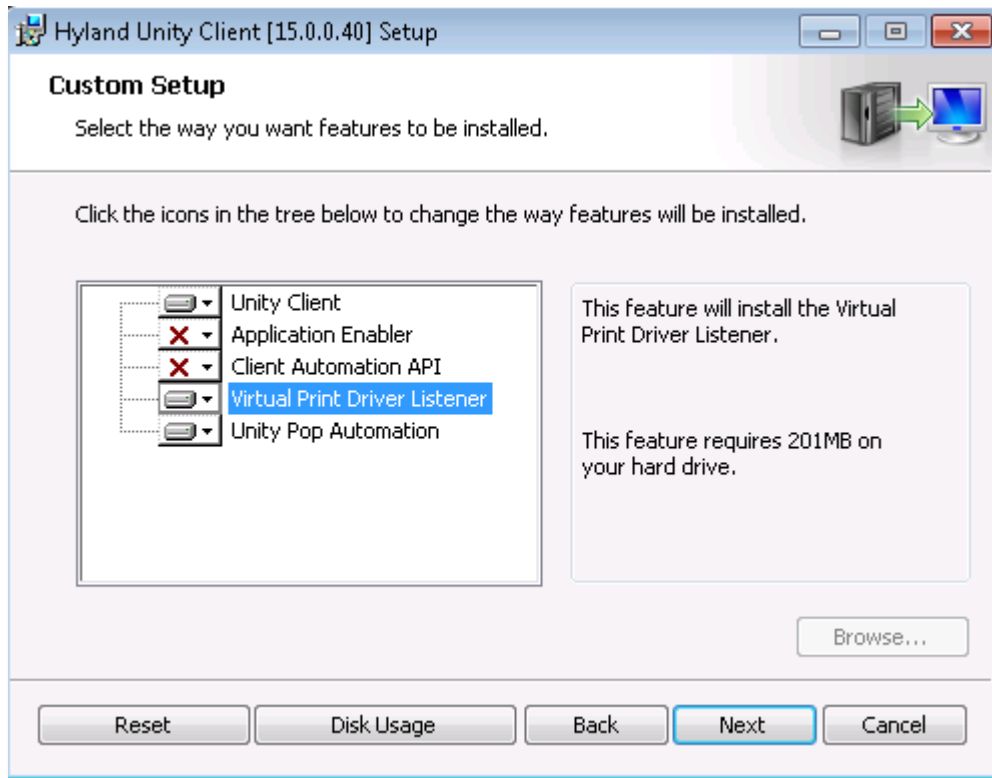
12) Enter the following parameters as shown below and then click Next.

Easy Copy Reference:

- **OnBase 15.0.0.40 -** https://kctcs.onbaseonline.com/appnet/service.asmx- Old version. Will not be active past Dec 2016
- **OnBase 15.0.2.174 -** https://kctcs.onbaseonline.com/1502AppNet/Service.asmx

13) Select the default mail client, leave "Prevent Client from launching on system startup" unchecked, and then click Install.

2.4 Login

1) Click on Start| select All Programs| Hyland and click on the Hyland Unity Client [KCTCS] icon; or, if a shortcut has been placed on the desktop double click on the Hyland Unity Client [KCTCS] icon.
2) You should receive a screen that looks like the following:
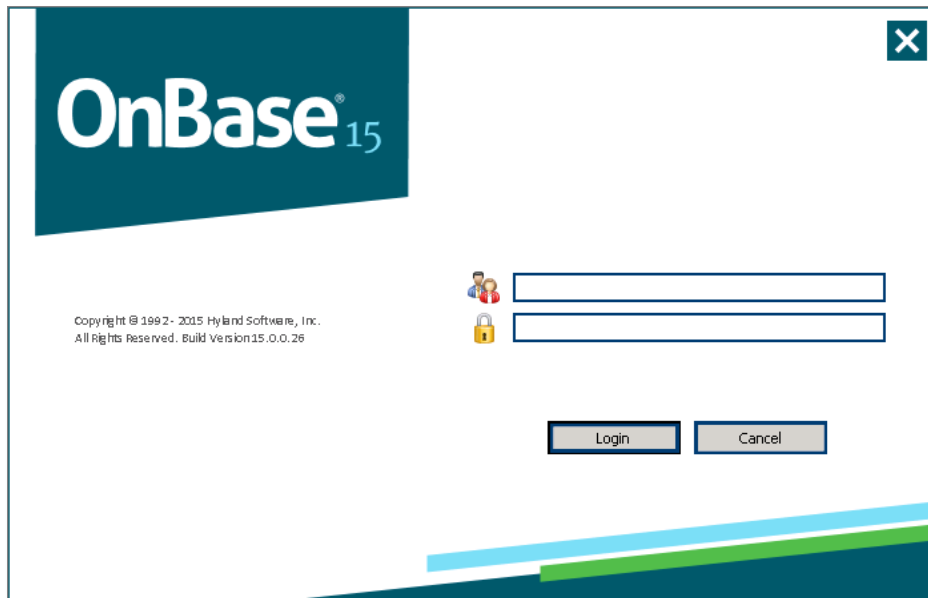
3) In the first box, enter your network user id. For example: JDOE0001 (Note: the username will appear in all caps)
4) In the second box, enter your password.
5) The first time you login, you may be given a license agreement to accept. Please click the Accept Button.
6) Upon successful login, the OnBase Home screen will appear.
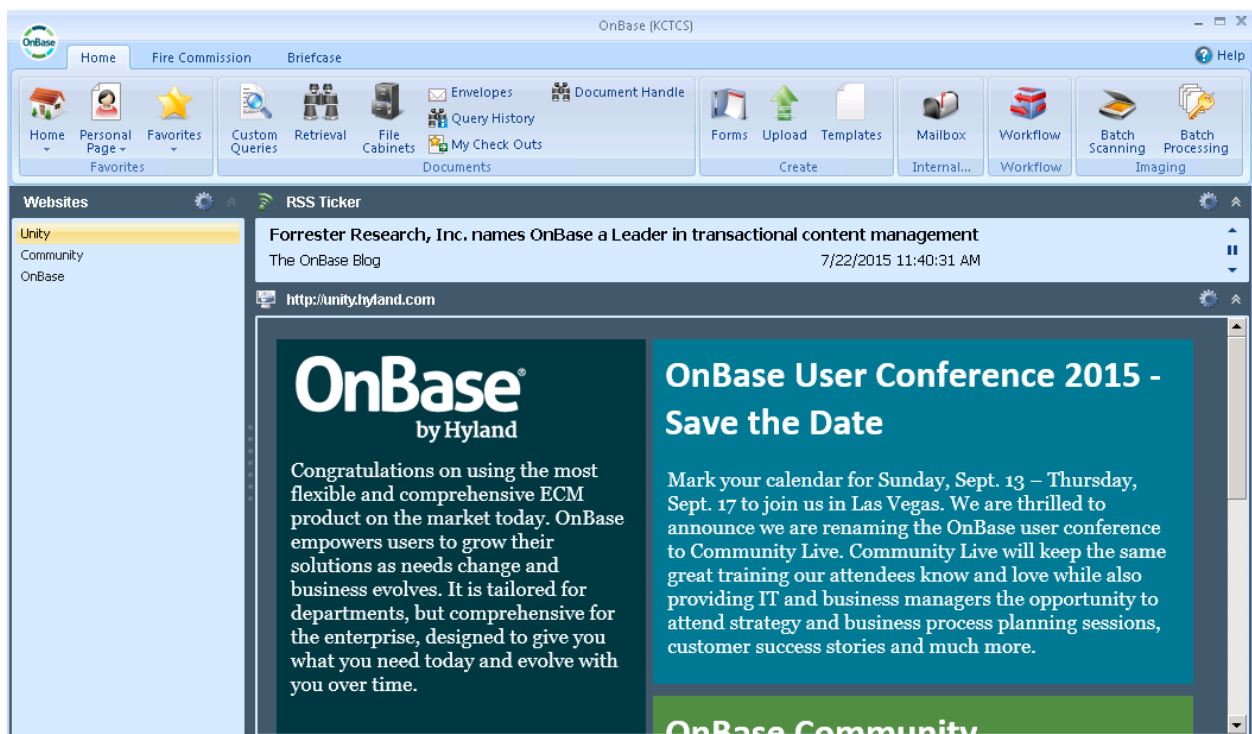
3 Virtual Print Driver

The Virtual Print Driver allows you to print TIFF images directly to OnBase, from any application capable of printing to a standard Windows® printer. This allows you to store almost any kind of document, whether it is a Microsoft® Excel workbook or a web page, as an image document in OnBase. Appearing as a standard printer to your existing Windows® applications, the Virtual Printer spools all print jobs as multi-page TIFF files, which can then be imported into OnBase.

The Virtual Print Driver should be installed on any workstation where the user has a need to place documents, as an image file format, directly into OnBase or to a directory that will be swept in at a later time. To import documents directly into OnBase via the Virtual Print Driver, the OnBase Unity Client must be open on the workstation. If the Unity Client is closed, the file will be sent to the Spool Directory.

Operating System Requirements
The above Client module supported operating systems require both:
- Windows 7, 8, 8.1, 10
- Microsoft .NET Framework 4.5.1 or 4.5.2
- Microsoft Visual C++ 2013 Redistributable Package (x86)

3.1 Installation

1. A user with administrative privileges will need to be logged into Windows to install the Virtual Print Driver.

   Note: If you are having security issues, and the prerequisite components are already installed, run the setup.exe file, by using the "Run as Administrator" option.

2. Open the web browser and go to https://kctcs.onbaseonline.com/1502downloads/
3. Click the Virtual_Print_Driver.zip to download the file to the workstation. **(Note: Hyland OnBase Virtual Print Driver x86.msi should be installed for machines running Windows 32 bit. Hyland OnBase Virtual Print Driver x64.msi should be installed for machines running Windows 64 bit)**
4. Extract the zip folder and then open the appropriate .msi file.
5. Click Next to begin the configuration.
6. The Spool Directory should default to C:\OnBase Printer Spool.
7. Select Auto Detect for the Environment and then click Next.
8. Click Install, once installation is complete, click Finish.
9. The Hyland Software Virtual Printer will now appear in the list of printer devices.

Note: OnBase Unity Client must be open in order to import a document via Virtual Print Driver.

4   Disconnected Scanning

The Disconnected Scanning module is a standalone scanning application that allows you to scan documents with a scanner, without being connected to an OnBase Client or OnBase Application Server. Additionally, you can import existing digital images directly from an electronic storage medium such as a hard drive or CD using "scan from disk" or "sweeping" processes. Documents can later be uploaded to the Application Server, where they can be accessed from workstations via the OnBase Web Client or Unity Client.

Operating System Requirements
The above Client module supported operating systems require both:
- Windows 7, 8, 8.1, 10
- Microsoft .NET Framework 4.5.1 or 4.5.2
- Microsoft Visual C++ 2013 Redistributable Package (x86)

4.1   Installation

1. A network administrator must be logged in to install the Disconnected Scanning software so the registry files will be created.
2. Open the web browser and enter the following URL: https://kctcs.onbaseonline.com/downloads
3. Download the Disconnected Scanning.zip file.
4. Extract the contents of the zip folder.
5. Open the Disconnected Scanning folder and run the setup.exe.
6. The Hyland Client Components Setup Wizard will start.
7. Click the Next button.
8. Click the "I Accept End User License Agreement…" box and click Next.
9. Enter Destination- Accept default unless you want the program installed in a different location , click Next.
10. Desktop shortcut will be checked by default, click Install.
11. Click on Entire feature installed on local… and click Next.
12. Ready to Install box will appear.
    a. Click on the Create Desktop Icon.
    b. Click the Install button.
13. Completed box will appear, click Finish.

4.2   Configuration

1. Once the install is completed, right click the Disconnected Scanning desktop shortcut and copy and paste the following code into the target field at the end:
   -NETAUTH -AL -ODBC="obKCTCS" -SERVER -DOMAIN="*"
   (Substitute*with your network domain.)
2. Open the Disconnected Scanning application by clicking on the Disconnected Scanning icon on the desktop.
3. Enter the "Local Diskgroup Base Path" and click OK – this is the location where images will be stored until they are uploaded to OnBase. The end user will need read/write access to this folder. (Suggestion: Create a Disconnected Scanning folder on the local drive: C:\Disconnected Scanning.)

4. Click Cancel and log off as the administrator and have the end user login to the workstation.
5. Open Disconnected Scanning and have the end user enter their Windows credentials Network ID).
   Click the Server button then enter the following server address:
   Easy Copy Reference:
   - **OnBase 15.0.0.40 -** https://kctcs.onbaseonline.com/appnet/service.asmx
   - **OnBase 15.0.2.174 -** https://kctcs.onbaseonline.com/1502AppNet/Service.asmx
6. Click OK, the Workstation Remote ID will appear, and then click OK.
7. Then select the Scan Queue drop down and click on the department name.
8. Then click on the Source drop down and choose the scanner. (**Note:** If there are options, choose the Twain scanner from the pick list.)
9. Then to the right of the format there is an add/modify scan format icon. Click on the icon and click on the "Add new format" button.
10. The scanner setting window will appear – select scanner settings. Additional scan formats can be created as needed.
11. The user is then ready to scan

4.3 Update Disconnected Scanning with Network ID Credentials

Need a user with administrator rights to do the following:
1.) A network administrator must be logged in to update the Disconnected Scanning configuration.
2.) Right click the Disconnected Scanning desktop shortcut and select **Properties**.
3.) At the end of the **Target** field add a space and then copy and paste the following code:
   -NETAUTH -AL -ODBC="obKCTCS" -SERVER -DOMAIN="*"
   (Substitute * with your network domain.)
4.) Click **OK**, enter your admin credentials if prompted.
5.) End user should now be able to enter his/her Windows credentials when logging into Disconnected Scanning.

5 Web Client

The OnBase Web Server provides users with immediate access to their information and documents anywhere, anytime, through standard Web browsers. The Web Client is a "lighter" version of the OnBase client that contains the same core functionality; however, some features are unavailable like, Batch Scanning.

5.1 Installation

- Open Internet Explorer
- Add https://kctcs.onbaseonline.com to the Trusted Sites list
- When configuring Internet Explorer security settings for client workstations, ensure that the ActiveX settings will allow the OnBase ActiveX controls to be downloaded. Workstations accessing the Web Client should have the **Script ActiveX controls marked safe for scripting** setting set to **Enable** or **Prompt**.
- Workstations accessing the Web Client should have **Allow script-initiated windows without size or position constraints** set to **Enable**.
- Enter in the address bar https://kctcs.onbaseonline.com/Appnet/login.aspx
- If the following message appears, click Install:
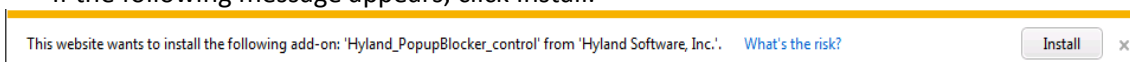
- The next screen should look something like this
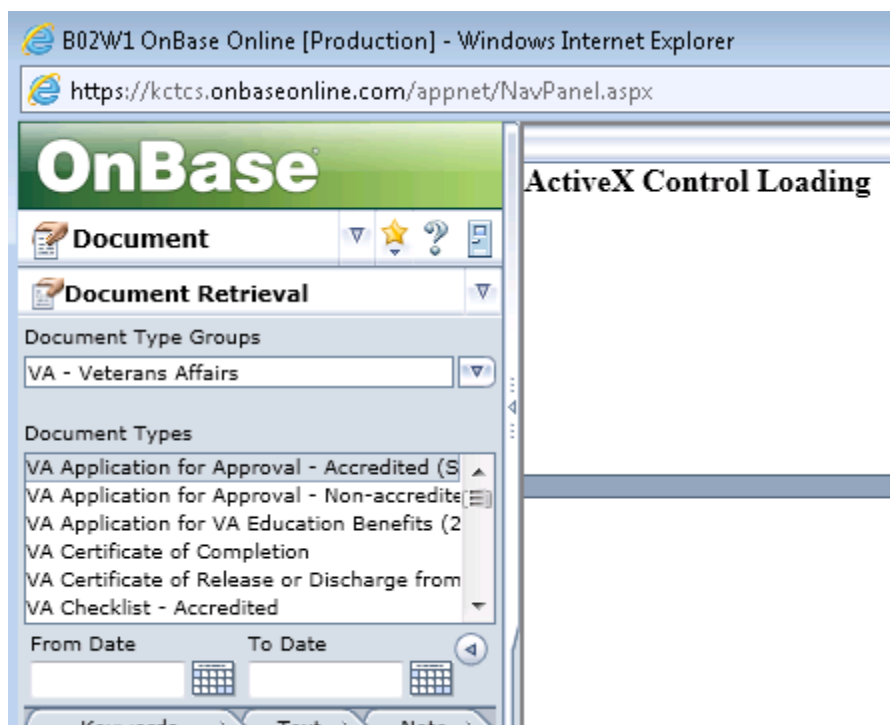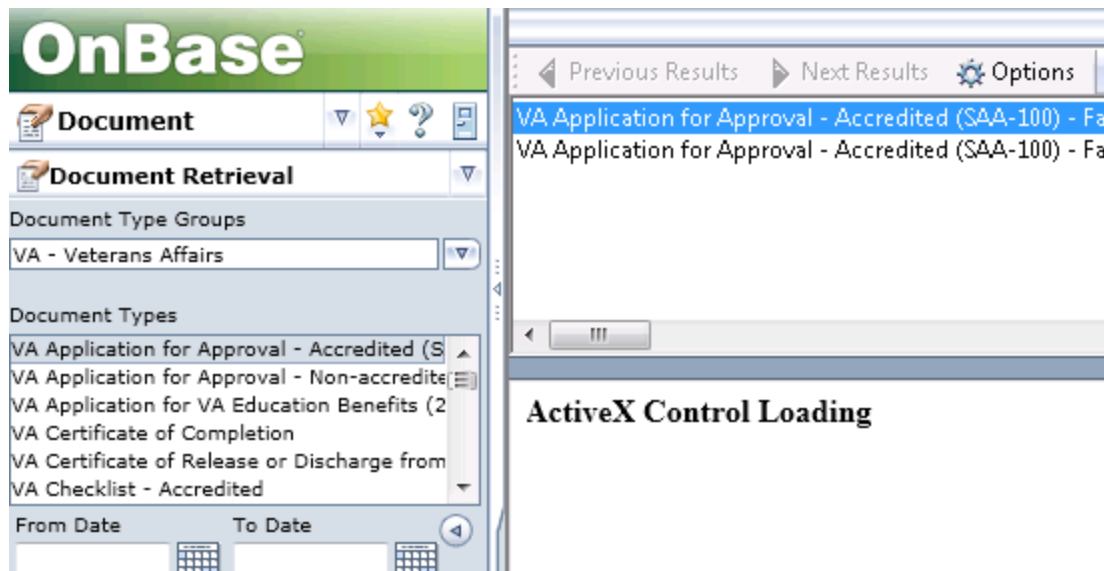

- If prompted with the message below, click Allow:

This webpage wants to run the following add-on: 'OBXWebDocumentSelect ActiveX Control Module' from 'Hyland Software, Inc. (unverified publisher)'.   Allow ▼   ✕
What's the risk?

- Try to perform a search that will have search results, and then double click a document to open it. The second active X control will begin to load.

- Once the Active X Control has finished loading, the document will appear in the window.

6 Outlook 2007/2010/2013/2016 Integration

The Outlook Integration tool uses Microsoft® Add-In technology to embed OnBase functionality in Microsoft Outlook. Users can import e-mails and/or their attachments directly into OnBase from Microsoft Outlook.

Operating System Requirements
- Microsoft .NET Framework 4.5.1
- Microsoft Visual Studio 2010 Tools for Office Runtime (x86) SP1
- 2010/2013: Windows 7, 8, and 8.1
- 2016: Windows 10

Note: Office 2016 users must have the SP2 version of Outlook integration installed.

6.1 Installation

1. A user with administrative privileges will need to be logged into Windows to install the Outlook Integration tool.
2. Open the web browser and go to:
    a. https://kctcs.onbaseonline.com/1502downloads for Office 2007/2010/2013/2016.
3. Click the Office Integration link and then click the appropriate Office.zip link per user, the download will begin.
4. Once the file has been downloaded, extract the contents of the zip file to a directory.
5. Open the appropriate Office folder per user and run the appropriate .msi file. **(Note: The OnBase suite of products is tested on 64-bit systems and is capable of being deployed on 64-bit systems using the Windows 32-bit on Windows 64-bit Emulator (WOW64) layer. However, OnBase modules that integrate with third-party applications may not be able to be used with the 64-bit versions of these applications. For these modules, only the 32-bit versions of these third-party applications are currently supported by the OnBase integrations.)**
6. The setup wizard will launch, click Next to proceed.
7. Accept the terms in the license agreement and then click Next to proceed.
8. Select the "Will be installed on local hard drive" option for the Outlook Integration module and then click Next.
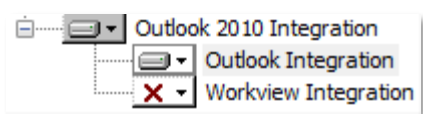
9. Enter the following information:

Easy Copy Reference:
- **OnBase 15.0.0.40 -** https://kctcs.onbaseonline.com/appnet/service.asmx Old version. Will not be active past Dec 2016
- **OnBase 15.0.2.174 -** https://kctcs.onbaseonline.com/1502AppNet/Service.asmx

10. Select the following options and then click Next:

11. Select the following options and then click Next:

12. Leave the Folder Configuration File field blank and click Next.
13. Click Install to being the installation.
14. Once the installation is complete, click Finish.

7   Document Control

Subject Matter	KCTCS OnBase Installation Guide
Client	KCTCS
Department	All Departments
Creation Date	03/16/2016
Publication Date	
Current Version	V 4.2
Status	OnBase 15
Author	**VeBridge Professional Services**